

DEPARTMENTAL INPUT

CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION

☐ New
 ☐ OTR
 ☐ Sole Source
 ☐ Bid Waiver
 ☐ Emergency
 Previous Contract/Project No. RFQ727

☒ Contract
☒ Re-Bid ☐ Other
 LIVING WAGE APPLIES: ☐ YES ☒ NO

Requisition No./Project No.: RQBU1600001
 TERM OF CONTRACT: 8 YEAR(S) WITH 0 YEAR(S) OTR

Requisition /Project Title: Management Consulting Services Pool

Description:
 Create an open pool (Request to Qualify) of pre-qualified bidders with applicable expertise in general management, finance, and economics consulting areas. OMB is the project manager; any County department may utilize the services of the Pool once authorized by OMB.

Issuing Department: OMB
 Contact Person: Jessica Tyrrell
 Phone: 305-375-4946

Estimate Cost: 950,000

Funding Source:
 GENERAL
X
 FEDERAL
X
 OTHER
X

ANALYSIS

Commodity Codes:	91875			
Contract/Project History of previous purchases three (3) years Check here <input type="checkbox"/> if this is a new contract/purchase with no previous history.				
	EXISTING	2ND YEAR	3RD YEAR	
Contractor:	See excel sheet attached.			
Small Business Enterprise:	Selection Factor			
Contract Value:	\$950,000 for six years			
Comments:	Funding based on dept utilizing			
Continued on another page (s): <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO				

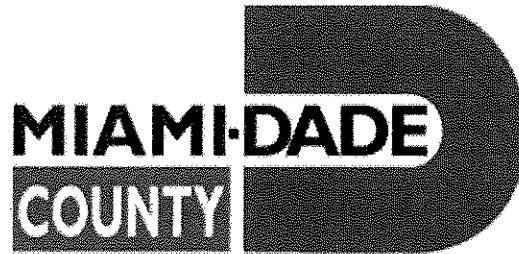
RECOMMENDATIONS

	Set-aside	Sub-contractor goal	Bid preference	Selection factor
SBE				
Basis of recommendation:				
Signed: Jessica Tyrrell			Date sent to SBD: 10/6/15	
			Date returned to DPM: 	

SOLICITATION NO.: RTQ-xxxxx

OPENING: 6:00 P.M.

, 2015



MIAMI-DADE COUNTY, FLORIDA

R E Q U E S T T O Q U A L I F Y

TITLE:

Management Consulting Services Pool

**BIDS WILL BE ACCEPTED UNTIL 6:00 PM
ON , 2015**

FOR INFORMATION CONTACT:

Jessica Tyrrell, 305-375-4946, tyrrell@miamidade.gov

IMPORTANT NOTICE TO BIDDERS/PROPOSERS:

- **READ THE ENTIRE SOLICITATION DOCUMENT, THE GENERAL TERMS AND CONDITIONS, AND HANDLE ALL QUESTIONS IN ACCORDANCE WITH THE TERMS OUTLINED IN PARAGRAPH 1.2(D) OF THE GENERAL TERMS AND CONDITIONS.**
- **THE SOLICITATION SUBMITTAL FORM CONTAINS IMPORTANT INFORMATION THAT REQUIRES REVIEW AND COMPLETION BY ANY BIDDER/PROPOSER RESPONDING TO THIS SOLICITATION.**
- **FAILURE TO COMPLETE AND SIGN THE SOLICITATION SUBMITTAL FORM WILL RENDER YOUR PROPOSAL NON-RESPONSIVE.**



GENERAL TERMS AND CONDITIONS:

All general terms and conditions of Miami-Dade County Procurement Contracts are posted online. Bidders/Proposers that receive an award from Miami-Dade County through Miami-Dade County's competitive procurement process must anticipate the inclusion of these requirements in the resultant Contract. These general terms and conditions are considered non-negotiable.

All applicable terms and conditions pertaining to this solicitation and resultant contract may be viewed online at the Miami-Dade County Procurement Management website by clicking on the below link:

<http://www.miamidade.gov/procurement/library/boilerplate/general-terms-and-conditions-r15-3.pdf>

NOTICE TO ALL BIDDERS/PROPOSERS:

Electronic bids are to be submitted through a secure mailbox at BidSync (www.bidsync.com) until the date and time as indicated in this Solicitation document. It is the sole responsibility of the Bidder/Proposer to ensure their proposal reaches BidSync before the Solicitation closing date and time. There is no cost to the Bidder/Proposer to submit a proposal in response to a Miami-Dade County solicitation via BidSync. Electronic proposal submissions may require the uploading of electronic attachments. The submission of attachments containing embedded documents or proprietary file extensions is prohibited. All documents should be attached as separate files.

For information concerning technical specifications please utilize the question/answer feature provided by BidSync at www.bidsync.com within the solicitation. Questions of a material nature must be received prior to the cut-off date specified in the solicitation. Material changes, if any, to the solicitation terms, scope of services, or bidding procedures will only be transmitted by written addendum. (See addendum section of BidSync site).

Please allow sufficient time to complete the online forms and upload of all proposal documents. Bidders/Proposers should not wait until the last minute to submit a proposal. The deadline for submitting information and documents will end at the closing time indicated in the solicitation. All information and documents must be fully entered, uploaded, acknowledged (Confirm) and recorded into BidSync before the closing time or the system will stop the process and the response will be considered late and will not be accepted.

PLEASE NOTE THE FOLLOWING:

No part of your proposal can be submitted via **HARDCOPY, EMAIL, OR FAX**. No variation in price or conditions shall be permitted based upon a claim of ignorance. Submission of a proposal will be considered evidence that the Bidder/Proposer has familiarized themselves with the nature and extent of the work, and the equipment, materials, and labor required. The entire proposal response must be submitted in accordance with all specifications contained in the solicitation electronically.

SECTION 2 – SPECIAL TERMS AND CONDITIONS**2.1 PURPOSE**

This Request to Qualify (RTQ) will establish a pool of pre-qualified Bidders capable of delivering/providing management consulting services for the Office of Strategic Business Management (OSBM). Entry into the pre-qualification pool is not a contract between Miami-Dade County (MDC) and any member of the pool, but rather is an acknowledgement that the pool member satisfies the pre-qualification criteria set forth below for membership in the pool. Pre-qualified Bidders will be invited to participate in future spot market competitions. The pool shall remain open for the term of the RTQ, enabling Bidders to qualify at any time after the initial RTQ opening date.

2.1.1 Future spot market competition(s) may be conducted by the County through the following processes:

- a. Work Order Proposal Requests (WOPR): a quality or quality and price evaluation with award based on ranking/points
- b. Request for Quotations (RFQ): award based on the lowest price offered
- c. Expedited Purchasing Program (EPP): a streamlined selection process

2.1.2 In addition to the methods stated in Section 2.1.1, the County reserves the right to conduct future competitions using whichever process it determines to be in its best interest. The procurement process to be followed will be defined in the spot market documents at the time of competition.

2.2 TERM

The pre-qualification pool will begin on the first calendar day of the month succeeding approval by the Board of County Commissioners, or designee, unless otherwise stipulated in the Notice of Award Letter which is distributed by the County's Internal Services Department, Procurement Management Services Division, and contingent upon the completion and submittal of all required RTQ documents. The pre-qualification pool shall expire on the last day of the last month of the _____ period.

2.3 OPTION TO RENEW**2.4 QUALIFICATION CRITERIA**

Bidders shall submit all of the qualifying documents with their submittal form. However, the County may, at its sole discretion and in its best interests, allow Bidders to supplement submitted documents in order to satisfy the prequalification criteria. It shall be the sole prerogative of the County to determine the number of Bidders who will be included under the pre-qualification pool. During the term of the RTQ, the County reserves the right to add and/or delete pre-qualified Bidders.

Responsive, responsible Bidders that meet the minimum qualifications shall be considered pre-qualified to participate in future competitions. Minimum qualifications are listed below:

- 2.4.1 Bidder shall maintain an office from which it conducts business. Bidder shall supply a copy of its current business tax receipt.
- 2.4.2 Bidder shall provide a brief description of the type of subject matter expertise and management consulting services that can be provided as it relates to Section 3.1 – Scope of Work and Section 3.2 – Services Requested. Bidder need not have expertise or experience in all fields in order to be pre-qualified.

2.4.3 Bidder shall provide a proof of experience providing quality management consulting services. Bidder shall provide a minimum of three different references for three different projects (similar in scope to those requested herein) completed within the last five years. One reference shall be from an organization with at least 100 total employees and each project listed shall have a different reference (contact person).

a. For each project list, the Bidder shall provide the following information

i. Organization name, reference (contact person), title, telephone number, and email address. The reference may be:

1. A customer for whom the proposer completed the consulting engagement;
or

2. Another qualified individual who can confirm the Bidder's expertise and ability to complete management consulting projects (ex: previous employer or previous client of company principal).

ii. Number of employees

iii. Description of project or work provided, including outcome / results

iv. Date of project commencement and completion (if applicable)

2.4.4 Bidder shall provide at least one sample work product that demonstrates the Bidder's ability to provide quality management consulting services.

NOTE: The County reserves the sole right to determine acceptability of qualification documents submitted for entry into the pool.

2.6 INDEMNIFICATION AND INSURANCE

Additional or revised insurance requirements outside of those listed in Section 1.22 may be necessary when performing work or services. Any change or addition in insurance requirements will be detailed in subsequent spot market solicitations.

SECTION 3 – TECHNICAL SPECIFICATIONS**3.1 SCOPE OF WORK**

The County seeks to create a pool of pre-qualified Bidders with applicable expertise in general management, finance, and economics consulting areas. In addition, specific projects may require subject matter expertise in the following areas (but are not limited to):

- Governmental Organizations
- Airports
- Code Enforcement
- Facilities and Fleet
- Human Services; Housing; Community Development
- Parks; Recreational / Cultural Programs
- Public Safety (Police, Fire, Corrections)
- Seaports
- Solid Waste
- Sustainability / Resilience
- Transit
- Water and Sewer / Utilities
- Public Works; Infrastructure

NOTE: This pool is not intended to be used for information technology (IT) consulting services.

3.2 SERVICES REQUESTED

Examples of potential project focus areas may include (but are not limited to):

- Strategic planning
- Master planning
- Program Planning and Evaluation
- Performance Management
- Business processes; Logistics and Operations; Simulation
- Lean / six sigma
- Organizational Structure and Culture; Change Management
- Human Resources
- Governance; Policy and Regulation Development
- Other studies, analyses, and reports relating to an agency's mission-oriented business programs or initiatives
- Rates, fees and cost recovery
- Bond support
- Cost allocation
- Risk
- Fiscal Controls
- Actuarial services
- Tax policy
- Special assessments
- Market and industry analysis
- Economic development planning

SECTION 4 – RTQ SUBMITTAL**QUALIFICATION CRITERIA****Paragraph** **Description**

- 2.4.1 Bidder shall maintain an office from which is conducts business. Bidder shall supply a copy of its current business tax receipt.

Initial to confirm attachment to this submittal: Click here to enter text.

Paragraph **Description**

- 2.4.2 Bidder shall provide a brief description of the type of subject matter expertise and management consulting services that can be provided as it relates to Section 3.1 – Scope of Work and Section 3.2 – Services Requested. Bidder need not have expertise or experience in all fields in order to be pre-qualified.

Section 3.1 – Scope of Work	
<u>Expertise Field</u>	<u>Experience</u>
Governmental Organizations	Click here to enter text.
Airports	Click here to enter text.
Code Enforcement	Click here to enter text.
Facilities and Fleet	Click here to enter text.
Human Services; Housing; Community Development	Click here to enter text.
Parks; Recreational / Cultural Programs	Click here to enter text.
Public Safety (Police, Fire, Corrections)	Click here to enter text.
Seaports	Click here to enter text.
Solid Waste	Click here to enter text.
Sustainability / Resilience	Click here to enter text.
Transit	Click here to enter text.
Water and Sewer / Utilities	Click here to enter text.
Public Works; Infrastructure	Click here to enter text.
Other Expertise Field not defined above	Click here to enter text.
Section 3.2 – Services Requested	
<u>Project Focus Areas</u>	<u>Experience</u>
Strategic Planning	Click here to enter text.
Master Planning	Click here to enter text.
Program Planning and Evaluation	Click here to enter text.
Performance Management	Click here to enter text.
Business Processes; Logistics and Operations; Simulation	Click here to enter text.
Lean / Six Sigma	Click here to enter text.
Organizational Structure and Culture; Change Management	Click here to enter text.
Human Resources	Click here to enter text.
Governance; Policy and Regulation Development	Click here to enter text.
Other studies, analyses, and reports relating to an	Click here to enter text.

agency's mission-oriented business programs or initiatives	
Rates, Fees and Cost Recovery	Click here to enter text.
Bond Support	Click here to enter text.
Cost Allocation	Click here to enter text.
Risk	Click here to enter text.
Fiscal Controls	Click here to enter text.
Actuarial Services	Click here to enter text.
Tax Policy	Click here to enter text.
Special Assessments	Click here to enter text.
Market and Industry Analysis	Click here to enter text.
Economic Development Planning	Click here to enter text.
Other Project Focus Area not defined above	Click here to enter text.

Paragraph **Description**

- 2.4.3 Bidder shall provide a proof of experience providing quality management consulting services. Bidder shall provide a minimum of three different references for three different projects (similar in scope to those requested herein) completed within the last five years. One reference shall be from an organization with at least 100 total employees and each project listed shall have a different reference (contact person).

Reference No. 1	
Reference (Company and/or Name and Title)	Click here to enter text.
Reference Address	Click here to enter text.
Reference Phone	Click here to enter text.
Reference Email	Click here to enter text.
Number of Employees	Click here to enter text.
Project Title	Click here to enter text.
Project Scope	Click here to enter text.
Project Outcome/Results	Click here to enter text.
Date of Project Commencement and Completion (if applicable)	Click here to enter text.

Reference No. 2	
Reference (Company and/or Name and Title)	Click here to enter text.
Reference Address	Click here to enter text.
Reference Phone	Click here to enter text.
Reference Email	Click here to enter text.
Number of Employees	Click here to enter text.
Project Title	Click here to enter text.
Project Scope	Click here to enter text.
Project Outcome/Results	Click here to enter text.
Date of Project Commencement and	Click here to enter text.

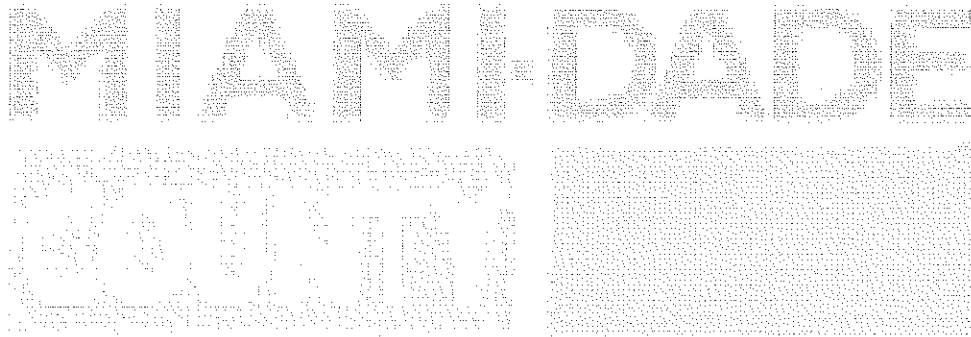
Completion (if applicable)	
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Reference No. 3	
Reference (Company and/or Name and Title)	Click here to enter text.
Reference Address	Click here to enter text.
Reference Phone	Click here to enter text.
Reference Email	Click here to enter text.
Number of Employees	Click here to enter text.
Project Title	Click here to enter text.
Project Scope	Click here to enter text.
Project Outcome/Results	Click here to enter text.
Date of Project Commencement and Completion (if applicable)	Click here to enter text.

<u>Paragraph</u>	<u>Description</u>
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2.4.4	Bidder shall provide at least one sample work product that demonstrates the Bidder's ability to provide quality management consulting services.
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Initial to confirm attachment to this submittal: Click here to enter text.



Business Name	Fein #	Suffix	NewApp	Active	Vendor Non-Perf.	Ins. Gap	Arrears	Ins Apprv	PB Apprv	Ins. N/A
MATRIX CONSULTING GROUP LTD	50545979	1	Yes	Yes	No	No	No			
KPMG LLP	135565207	1	Yes	Yes	Yes	No	No			
RAFTELIS FINANCIAL CONSULTANTS INC	201054069	1	Yes	Yes	No	No	No			
WOOLPERT INC	201391406	1	Yes	Yes	No	No	No			
EVERGREEN SOLUTIONS LLC	201833438	1	Yes	Yes	No	No	No			
EMERGENCY SERVICES CONSULTING	232826074	4	Yes	Yes	No	No	No			
MAXIMUS CONSULTING SERVICES INC	261557956	1	Yes	Yes	No	No	No	Yes		
CROWE HORWATH LLP	350921680	1	Yes	Yes	No	No	No			
GOVERNMENT FINANCE OFFICERS	362167796	1	Yes	Yes	No	No	No			
GALLAGHER BENEFIT SERVICES INC	364291971	1	Yes	Yes	No	No	No			
HAGERTY CONSULTING INC	371431085	1	Yes	Yes	No	No	No			
EMA INC	411467091	1	Yes	Yes	No	No	No			
BLACK & VEATCH CORPORATION	431833073	1	Yes	Yes	No	No	No			
THOMPSON COBB BAZILIO & ASSOC'S PC	521563500	1	Yes	Yes	No	No	No			
MGT OF AMERICA INC	591576733	1	Yes	Yes	No	No	No			
PMG ASSOCIATES INC	592389513	1	Yes	Yes	No	No	No			
SHARPTON GROUP PA	592471070	1	Yes	Yes	No	No	No			
SHARPTON GROUP PA	592471070	2	Yes	Yes	No	No	No			
MILIAN SWAIN & ASSOCIATES INC	650094999	1	Yes	Yes	No	No	No			
CMA ENTERPRISE INC	650208560	1	Yes	Yes	Yes	No	No			
WASHINGTON ECONOMICS GROUP INC	650376970	1	Yes	Yes	No	No	No			
PLANNING & ECONOMICS GROUP INC	650526212	1	Yes	Yes	No	No	No			
JRD & ASSOCIATES INC	650627780	1	Yes	Yes	No	No	No			
S DAVIS & ASSOCIATES PA	650719690	2	Yes	Yes	No	No	No			
AUXIS INC	650754393	1	Yes	Yes	No	No	No			
LAMBERT ADVISORY LLC	650952060	1	Yes	Yes	Yes	Yes	No			
A L JACKSON & COMPANY PA	710669879	1	Yes	Yes	Yes	Yes	No			

White Jr., Tyrone (ISD)

From: Johnson, Laurie (ISD)
Sent: Thursday, October 29, 2015 9:40 AM
To: White Jr., Tyrone (ISD); Adams-Parish, Traci (ISD); Young, Hollis (ISD); Gannon, Shawn (ISD)
Cc: Washington, Latoya (ISD)
Subject: FW: RQBU1600001 - Management Consulting Services Pool
Attachments: CurrentlyAwardedVendors_RFQ727.xlsx; RTQ MACS Pool Draft.docx; SBD Input - RQBU1600001.doc; image001.png

Good morning Team,

Please review the attachments and process as requested.

Thanks.

Laurie Johnson, SBD Section Chief
Internal Services Department
Small Business Development
111 NW 1st Street #19 Floor, Miami, FL 33128
Phone No. 305-375-3121 / Fax No. 305-375-3160

<http://www.miamidade.gov/smallbusiness>


"Delivering Excellence Every Day"

*Miami-Dade County is a public entity subject to Chapter 119 of the Florida Statutes concerning public records.
E-mail messages are covered under such laws and thus subject to disclosure.*

☐ Please consider the environment before you print this email

From: Tyrrell, Jessica (ISD)
Sent: Tuesday, October 27, 2015 9:31 AM
To: Johnson, Laurie (ISD)
Cc: Walters, Vivian (ISD)
Subject: FW: RQBU1600001 - Management Consulting Services Pool

Hi Laurie,

I haven't received the measures for the below request. Can you please advise the status?

Thank you!

Jessica

Jessica Tyrrell, MBA
Miami-Dade County Internal Services Department
Procurement Management Services Division
111 NW 1st Street, Suite 1300, Miami, FL 33128
(P) 305-375-4946 (F) 305-375-4407 (E) tyrrell@miamidade.gov
Visit our website: www.miamidade.gov/procurement
Connect With Us on [Twitter](#) | [Facebook](#) | [Instagram](#)

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From: Tyrrell, Jessica (ISD)

Sent: Tuesday, October 06, 2015 10:24 AM

To: Johnson, Laurie (ISD) <LAURIE@miamidade.gov>

Cc: Office of Commission Auditor (OCA) <OCA@miamidade.gov>; Walters, Vivian (ISD) <WalterV@miamidade.gov>

Subject: RQBU1600001 - Management Consulting Services Pool

Good Morning Laurie!

I have attached the input document, supplemental excel spreadsheet, and associated RTQ draft for the subject item. Can you please assign this item for review for measures? Please let me know if there is anything I can do to assist in expediting this item.

Thank you!

Jessica

Jessica Tyrrell, MBA

Miami-Dade County Internal Services Department

Procurement Management Services Division

111 NW 1st Street, Suite 1300, Miami, FL 33128

(P) 305-375-4946 (F) 305-375-4407 (E) tyrrell@miamidade.gov

Visit our website: www.miamidade.gov/procurement

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